Syndicated and Local Programming

American Public Television (unrelated to American Public Media which is radio) licenses a large number of programs to PBS and public radio stations, programs such as British sitcoms; documentaries; travel, cooking and music programs; how-to series; and movies from Warner/Turner and 20th Century Fox (for a more complete listing, see *www.aptonline.org*). This company is a significant player in public television programming and a prime source of entertainment programs for public stations.

In addition, because of its role in formal education, public television has had to develop its own unique body of syndicated material to meet instructional television needs. A number of centers for program distribution have been established to perform the same function as commercial syndication firms, but on a noncommercial, cooperative basis (see 10.13 for more on these centers).

Noncommercial Syndication

The abundance of ITV materials means that it is no longer necessary to produce instructional programs locally, except where desired subject matter is unique to a community. Local school authorities are usually in charge of selecting instructional materials for in-school use, although the public television station's staff often serves as liaison between sources of this material and users. In addition, the state may appropriate funds for instructional programs, giving them to its public stations, or school districts may contract with a local public station to supply particular ITV programs at certain times.

Noncommercial Adult Education

Quality programming for adult learners is also now available in quantity to public stations. Beginning in the late 1970s, various consortia began to turn out *telecourses* (television courses) for integration into the curricula of postsecondary institutions. These efforts have centered particularly in community

10.13 Noncommercial Syndicators

The Agency for Instructional Technology (AIT) in Bloomington, Indiana, produces series for primary grades, high school and postsecondary students. Among the best known are *All About You, Math Works, Assignment: The World* and *Up Close and Natural*. AIT took the lead in developing innovative classroom programs that operate in conjunction with desktop computers, creating the first interactive lessons on DVD.

Great Plains National (GPN) in Lincoln, Nebraska, offers dozens of series for elementary and junior high use along with a great many materials for college and adult learning. Titles in its catalog range from *Reading Rainbow* (for first graders) to *The Power of Algebra, Tombs and Talismans* and *Truly American* (for high schoolers and adults).

Western Instructional Television (WIT) in Los Angeles offers more than 500 series in science, language arts, social studies, English, art and history. TV Ontario also supplies U.S. schools with dozens of instructions series, especially in science and technology, including *Read All About It, The Landscape of Geometry* and *Magic Library*. Even PBS, through its Elementary/Secondary Service, offers a slate of ITV programs, such as *The Voyage of the Mimi, Amigos* and *Futures with Jaime Escalante*.

These not-for-profit companies fund their operations in a variety of ways, including leasing programming they own to stations and PBS for broadcast, selling DVDs to the general public, and acquiring contracts from private foundations and state and national agencies. For example, in 2011 AIT (for the fifth year) secured the fulfillment contract for Jumpstart's "Read for the Record" campaign. This national program, funded in part by the Pearson Foundation, was an effort to close the early achievement gap for some children living in lower economic environments. Similarly, AIT has partnered for years with the Kettering Foundation and local and state organizations dedicated to literacy and childhood education.

colleges, led by Miami-Dade (Florida), Dallas (Texas), Coastline Community College (Huntington Beach, California) and the Southern California Consortium. With budgets ranging from $100,000 to $1 million for a single course, they have proven to be sufficiently well produced to attract casual viewers as well as enrolled students.

Meanwhile, faculty members at other leading postsecondary institutions began developing curriculum materials to accompany several outstanding public television program series distributed nationally through PBS for general viewing. The first of these was *The Ascent of Man*, with the late Dr. Jacob Bronowski, a renowned scholar as well as a skillful and effective communicator on camera. More than 200 colleges and universities offered college credit for that course. Others quickly followed (*The Adams Chronicles, Cosmos, Life on Earth, The Shakespeare Plays*) as programmers discovered that such series furnished the casual viewer with attractive public television entertainment and simultaneously served more serious viewers desiring to register for college course credits.

This experience led many public television programmers to realize that too much had been made of the supposed demarcation between ITV and PTV. Too often during earlier years, many program producers would not even consider producing so-called instructional television. The first Carnegie Commission in 1965 strengthened this presumed gap by not concerning itself with television's educational assistance to schools and colleges and by adopting the term *public television* to mean programming for general viewing. The narrowing of the distance between instructional and general interest programming has been highlighted by the broad use of such public TV documentaries as *Baseball* and *The Civil War* by Ken Burns in the classroom setting (see 10.14).

The lesson for public television has been that ITV and PTV programs can appeal to viewers other than those for which they were especially intended. The Annenberg/CPB series is only one example. Another is *Sesame Street*, which was initially intended for youngsters in disadvantaged households—yet the in-school use of *Sesame Street* has been one of the significant occurrences in kindergarten and lower elementary classrooms throughout America, leading to new and more complex attitudes toward television in and out of the classroom (see 10.15). Ironically, *Sesame Street* may also contribute to the gap in knowledge between advantaged and disadvantaged children because it is widely watched (and learned from) by already advantaged children, perhaps making the disadvantaged more disadvantaged.

Commercial Syndication

More extensively tapped than noncommercial sources, however, are such commercial syndicators as Time-Life, David Susskind's Talent Associates, Wolper Productions, Granada TV in Great Britain, and several major motion picture companies including Universal Pictures. Public television stations sometimes negotiate individually for program packages with such syndicators; alternatively, they can join with the public stations through regional associations to make group buys.

Commercially syndicated programs obtained in this way by PTV include historical and contemporary documentaries, British-produced drama series and packages of highly popular or artistic motion pictures originally released to theaters. Such programming, because it was designed for general audiences, is thought to bring new viewers to a public station. Many programmers believe those new viewers can then be persuaded, through promotional announcements, to watch more typical PTV fare (and maybe, just maybe, become members).

The proportion of commercially syndicated programs in public television station schedules, nonetheless, averages less than 5 percent of broadcast hours. The number stays small partly because those syndicated programs that public stations find appropriate are relatively *expensive;* unless the station secures outside underwriting to cover license fees, it usually can't afford them. Stations now pay as much as $100,000 for an hour of British television that cost as little as $50,000 a few years ago. Another reason is *philosophical:* Although much commercially syndicated material has strong audience appeal, its educational or cultural value is arguable.

10.14 Ken Burns and PBS: A Match Made in Broadcasting Heaven?

There is probably no single person more closely identified with the Public Broadcasting System than Ken Burns. Hailed for over 30 years as the most prolific, most influential, and most awarded documentary filmmaker in the United States, Burns has produced virtually all of his groundbreaking films with and for PBS. And while some of his earliest pictures were produced for theatrical release, it's PBS that made Burns who he is, and he's returned the favor many times over.

Burns is best known for his epic PBS documentary miniseries *The Civil War* (1990), *Baseball* (1994 and 2010) and *Jazz* (2001), all of which were nominated for—and in the cases of *The Civil War* and *Baseball*, winners of—multiple Emmy awards. But Burns's vast filmography also includes docs on topics as diverse as the U.S. park system (*The National Parks: America's Best Idea*, 2009), women's suffrage (*Not for Ourselves Alone: The Story of Elizabeth Cady Stanton and Susan B. Anthony*, 1999), American landmarks (*The Statue of Liberty*, 1985), and individuals as different as Huey Long (1985), Thomas Jefferson (1997), Frank Lloyd Wright (1998) and the first black heavyweight boxing champion (*Unforgivable Blackness: The Rise and Fall of Jack Johnson*, 2004). These and Burns's other acclaimed films skillfully interweave archival still and motion photography, period music, interviews with experts and voice-over narration by respected actors and historians to create what has become a trademark Ken Burns look and feel.

Like many documentarians, Burns plays a variety of simultaneous roles in the production of his films, serving as not only director but also, almost always, as producer, writer, cinematographer and even music composer. For his troubles, he's taken home a slew of Emmys and two Oscar nominations and has been a nominee or winner of awards bestowed by organizations as diverse as the Directors Guild of America, the International Documentary Association, the Sundance Film Festival, the George Eastman House Museum of Photography and Film, the Western Writers of America and the Organization of American Historians.

But perhaps the honor (if it can be called that) most closely associated with Mr. Burns in the minds of filmmakers and editors is as the inspiration for the so-called Ken Burns Effect, a panning and zooming technique that can be found in just about every one of Burns' films as well as those of documentarians he's inspired. (Burns didn't invent the technique, but he's used it so often and so consistently that, for better or worse, it's come to bear his name.) Since Burns in his PBS documentaries uses so many still images—archival photos mostly, but also paintings, illustrations and clippings from old newspapers and other stationary two-dimensional visual materials—he's found that he can bring his movies to life by, for example, having his camera zoom in on one individual in a photo, then panning across the width of the picture

Local Production

The percentage of airtime filled with locally produced programming has gradually decreased over the years as both network and syndicated programming have increased in quantity and quality. Owing mostly to its high cost, the percentage of total on-air hours produced solely *for local use* by public television stations had declined from 16 percent in 1972 to much less than 5 percent by the mid-2000s. Moreover, production quality expectations have risen. More time and dollars and better facilities must now be used to produce effective local programs.

Locally produced programs, nonetheless, are far from extinct in public television. A survey of station producers found that, among the 79 licensees responding, more than 3,000 programs had been produced during the past year. Among them were weekly and occasional nightly broadcasts devoted to activities, events and issues of local interest and significance.

Also, many stations regularly cover their state governments and legislators. Unlike commercial stations, which concentrate on spot news and devote a minute or less to each story, public stations see their role as giving more comprehensive treatment to local matters. But news and public-affairs programs aren't the only kinds being produced. The survey found stations turning out a spectrum of arts and performance, documentaries, sports events and sports talk,

before coming to rest on the face of another person in the photo, and then zooming in on or out from that second person.

The popularity of Burns' films has been a boon for PBS. In fact, the initial (1990) airing of the 11-hour *Civil War* mini-series attracted more than 40 million viewers, a public television ratings record that still stands some two decades later. (The PBS network and its member stations, recognizing the continuing appeal of *The Civil War*, repeatedly trot it out during fundraising drives.) Because Burns' work is so well respected—and is such a reliable audience draw—in 2008 the Corporation for Public Broadcasting committed to a 10-year agreement with Burns and his production company, Florentine Films. Under the agreement, CPB provided funding for the development of new Burns projects, including *Prohibition* (2011) as well as *Vietnam* (targeted for 2016), biographies of the Roosevelts (Teddy, Franklin and Eleanor) and a look at the history of country music.

Given the continual threats of budget reduction and even elimination that public broadcasting perennially faces, the fact that the CPB has made such a long-term commitment to the development of new Ken Burns films is encouraging. Indeed, Burns himself is all too familiar with funding problems; in 2009, his long-term supporter General Motors publicly announced that it would no longer be able to underwrite Burns' work. (GM, of course, is far from the only major corporation to cut back on its financial support for PBS and its programs.)

Indeed, the threats to public broadcasting—and, as a result, to the continued viability of his own career—thrust Burns into the political spotlight in early 2011. As Congress yet again debated the desirability of funding PBS during a recession, Burns wrote an op-ed piece for the *Washington Post* entitled "Public Broadcasting: A 'Luxury' We Can't Do Without." In his article, Burns defended the quality of PBS's work, contrasting it with the content of commercial broadcasting. "With minimal funding," Burns wrote, "PBS manages to produce essential (commercial-free) children's programming as well as the best science and nature, arts and performance, and public affairs and history programming on the dial—often a stark contrast to superficial, repetitive and mind-numbing programming elsewhere." Burns not only stood up for PBS's mission; he also unambiguously gave public television credit for the existence and success of his own work: "Many say that what can't survive in the marketplace doesn't deserve to survive. Not one of my documentaries, produced solely for PBS over the past 30 years, could have been made anywhere but on public broadcasting."

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history, comedy, science, nature and even (surprise) original children's programs.

Scheduling Strategies

Nowadays, PBS programmers want to maximize audiences. Gone are the educational television days when paying attention to audience size was sneered at in public television. The prevailing attitude at PBS recognizes that a program must be *seen* to be of value and that improper scheduling prevents full realization of a program's potential. Member stations now recognize that bigger audiences also mean a bigger dollar take during on-air pledge drives.

Counterprogramming the Commercial Networks

Competition, of course, is a key consideration. There are three ways to respond to it:

1. Offensively, by attempting to overpower the competitor
2. Defensively, by counterprogramming for a different segment of the audience than the competitor's program is likely to attract
3. By ignoring the competition altogether and hoping for the best

PBS has never been able to go on the offensive; its programs lack the requisite breadth of appeal.

10.15 Remembering *Sesame Street*

Generations of preschoolers, probably including you, learned the alphabet—and a whole lot more—from watching the Muppets. *Sesame Street* premiered in 1969 on National Education Television Network, now called the Public Broadcasting Service. After 43 seasons and nearly 4,500 episodes, it's one of the longest-running shows in television history. Created by Jim Henson, *Sesame Street* is probably the most respected educational program in the world.

The original U.S.-produced show currently airs in 120 countries, and more than 20 international versions are produced in such countries as Brazil, Mexico, France, Turkey, China and Russia. More than 77 million Americans watched *Sesame Street* as children, as well as millions more worldwide. One survey reported that 95 percent of all American children watched *Sesame Street* by the time they were 3 years old, and based on Nielsen ratings, the show continues to appear among the top 15 children's programs on television.

Sesame Street teaches letters and numbers, as well as basic word recognition, mathematics and science, but its goals include basic social skills. *Sesame Street* has worked toward teaching children about how to make friends, practice good hygiene and eat healthfully. Known for its rigorous ongoing research, the program's overall curriculum has changed over time to reflect the problems of growing up in America. At the same time, using witty humor and fast pacing, the show tries to appeal to parents and older siblings as well as preschool children.

While the elaborate hand-held puppets called the Muppets are central to *Sesame Street*'s broad appeal, its live actors keep the show grounded, and the program has led the way in portrayals of minorities on television. The program has been praised for its multicultural cast, as well as for the actors' overall longevity. *Sesame Street* boasts the longest-running Hispanic character in the history of television (Luis) as well as the longest-running character with a disability (Linda, who is deaf) and what are believed to be the longest running African-American characters (Gordon and Susan).

The changing relationships among the people who act the characters also get incorporated into the program. For example, Luis married Maria, the owner of *Sesame Street*'s Fix-It-Shop, and Maria later gave birth to Gabby; Maria's pregnancy became part of the show's storyline. Gordon and Susan's story included the adoption of their son Miles. When original cast member Will Lee, who had played store owner Mr. Hooper, died, producers chose to include the death of Mr. Hooper into *Sesame Street*'s story. The producers believed that the inclusion of Mr. Hooper's death would educate children about the death of a loved one.

By the late-1990s *Sesame Street*'s producers had come to the realization that the modern child had different viewing habits than the child of the past. At the same time, the explosion of more programming—on cable television, on the internet and on DVDs—led to an increased level of competition for *Sesame Street* and wee-bit-of-a-drop (!) in the ratings, so the producers took steps to make structural changes. First was the inclusion of *Elmo's World* as a miniseries during the final fifteen minutes of every episode of *Sesame Street*. This segment follows the adventures of *Sesame Street*'s most popular Muppet monster, 3½ year old Elmo. In the early 2000s, *Sesame Street* began including more narrative and more storylines in its modular episodes.

The popularity of the Muppet characters and the show's overall success turned *Sesame Street* into one of the earliest and most enduring multiplatform brand names. It may also deserve an award for being the most studied program in history: Decades of scholars have poured over it, trying to assess its influence and efficacy. Comic writer Michael Davis has been quoted as saying: "Sesame Street [is] perhaps the most vigorously researched, vetted, and fretted-over program on the planet. It would take a fork-lift to now haul away the load of scholarly paper devoted to the series…"*

In addition to its 118 Emmy award wins (more than any other series in the entire history of television), including a Lifetime Achievement Emmy in 2009, the show has won 11 Grammys, has its own theme park (Sesame Place), publishes magazines on five continents and generates movies, toys, books, DVDs and video games. The clever use of Muppets, animation, music and live actors in brief modular segments results in a broad-appeal program capturing the imagination of millions of children while involving them and their parents in the learning process.

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*Davis, Michael. *Street Gang: The Complete History of Sesame Street*. New York: Viking Books, 2008.

Prime-time PBS shows average around a 1.2 household rating. ABC, CBS, FOX and NBC regularly collect ratings of 4.5–6 (although their figures are much smaller than a decade ago—the result of audience defections to the many cable networks and online services).

PBS, then, must duck and dodge, a strategy called *counterprogramming*. By studying national Nielsen data, programmers learn the demographic makeup of competing network program audiences so they can place their own programs more advantageously. For example, a symphony performance that tends to attract well-educated women older than 50 (*upscale* in socioeconomics) living in metropolitan areas would perform well opposite FOX's *The Simpsons*, NBC's *Deal or No Deal*, or CW's *WWE Friday Night Smackdown!*, all having *downscale* (lower socioeconomic) audiences. Similarly, in searching for a slot for the investigative documentary series *Frontline*, PBS did not consider for a moment the 8 to 9 P.M. slot on Sundays because football overruns often push 60 *Minutes* into this slot.

PBS tries to avoid placing a valued program against a hit series in the commercial schedules, although there aren't enough such slots. The network also has traditionally avoided placing important programs during the three key periods of all-market audience measurement (sweeps) in November, February and May—times when commercial television throws its blockbusters at the audience.

But because the commercial networks have cut back on sweeps blockbusters in recent years (especially costume-drama miniseries, which lure away many PBS viewers), PBS has grown more willing to run an important series through a sweeps month. This is clearly a calculated risk, a kind of TV "minefield"; a powerful commercial network special could draw off so many viewers from a weekly PBS miniseries that few would return to see its continuation and concluding episode.

Further, because public as well as commercial stations are measured during the sweeps, PBS's stations demand a "solid" schedule, with a minimum of "mission programs." This is a mildly pejorative reference to public television's mission to serve all Americans, specifically referring here to narrow-appeal programs of interest only to some very small groups of viewers. Many programs are "good for the mission" but earn small ratings. Thus, during the sweeps, PBS now displays many of its strongest—not weakest—programs.

By the mid-2000s the top programmers at PBS had decided to stop using ratings as a "rear-view mirror" and had begun to state goals for their programs, using a formal process that judges prime-time programs according to predetermined goals. Some stations continue to be nervous about the transition to objective standards, preferring to balance critical acclaim and awards against audience size. Nevertheless, PBS must be accountable to an ever-shrinking number of underwriters who want their programs to be seen, really seen.

Stripping and Stacking Limited Series

A standard among PBS's offerings, the *limited series* includes both nonfiction and fictional miniseries (as explained in Chapter 2, limited series have continuing topics with a fixed number of episodes, usually ranging from 3 to 12 or more). Some notable examples in recent years include *Texas Ranch House; Jean-Michel Cousteau: Ocean Adventures; African-American Lives;* and Ken Burns' *The War*. Most limited series appear once a week in prime time, much as weekly series are scheduled on commercial television.

Because short-run series lose viewers across the first few weekly telecasts, however, PBS schedulers have experimented with alternative play patterns in the hope of staunching the dropoff. Borrowing jargon from computer technology, they asked whether limited series scheduling could be made more "user friendly." Experiments with the *Holocaust* series and *Shoah* in 1988 showed that limited series that have sufficiently engaging material lend themselves to airing on consecutive nights, a practice known in commercial television as *stripping*. This ploy not only attracted at least as many viewers as tuned in to similar programs on a weekly basis but also encouraged viewers to spend significantly more time watching the series. Moreover, the episode-to-episode ratings dropoff disappeared.

Which limited series receive special treatment and which must air in the usual once-a-week way

has hinged on a decision about what "sufficiently engaging material" means. This is in part a function of production budget, advance promotion, casting, subject matter and less well-recognized variables such as timing, quality and appeal to the public television audience. Such decisions cannot be supported by audience research alone; the programs must be screened (watched) as well. Ultimately, the chief program executive now makes the call.

When a limited series has too many episodes for convenient stripping, PBS bunches episodes together, *stacking* two episodes per evening. Ken Burns's epic on World War II, *The War*, for example, was scheduled in this pattern, thereby limiting the magnitude of nightly commitment on the part of viewers. PBS's practice is to schedule limited series on a maximum of five consecutive nights (although *The War* required seven evenings).

Audience Flow

Certain PBS series are especially dependent on audience flow from a strong lead-in. New, untried programs especially need scheduling help. *The Ring of Truth*, a six-part series on the scientific method, for example, was not expected to build a loyal following the way a predictable series such as *Washington Week in Review* has. Thus it was placed following an established, successful science series, *NOVA*, which regularly draws large audiences (large, that is, for public television) and itself has no need of a powerful lead-in.

Particularly in need of a lead-in boost—on a regular basis—is another PBS staple, the *umbrella series*. These are anthologies of single programs with loosely related content that appear under an all-encompassing title (or umbrella) such as *American Experience* (history programs) or *Great Performances* (ballet, plays, operas, orchestral music, Broadway shows and so forth). Because the material offered under the umbrella changes from week to week, the audience never knows what to expect. Clearly, the format works *against* habit formation. Thus, it is essential that a strong audience be introduced to each week's episode, if not by costly media advertising (usually out of public television's reach), then by a substantial lead-in.

Considerations at the Station Level

A public television program schedule is notable for its variety; it is meant to serve the total population over time but not the complete needs of the individual viewer. Although this is also true of commercial stations, it especially applies to public television schedules. Because they usually are so focused in content, PTV programs tend to be watched by small, often demographically-targeted population segments. Seeking the most opportune time slot for reaching those target groups is the local program manager's challenge.

No U.S. PTV programmer ever builds an entire schedule from scratch nowadays. Rather, the manager's ongoing responsibility is to maintain a schedule while considering the following factors:

1. Licensee type, as each carries its unique program priorities
2. Audience size and demographics
3. Competition from commercial stations, other public television signals and cable networks
4. Daypart targeting, such as daytime for children's programs and instructional services, and early evenings for older adults
5. Program availability

No single element overrides the others, but each affects the final schedule. Public television programmers seek programs that meet local audience needs and schedule those programs at times most likely to attract the target audience. Because all audience segments cannot be served at once, the mystery and magic of the job is getting the right programs in the right time slots. High ratings are not the primary objective; serving the appropriate audience with a show they will watch that adds to the quality of their life, is.

National Promotion

Still another consideration is the importance of national promotion. Fledgling programs and episodes of an umbrella series need extra help for viewers to discover them. Although an effective lead-in program is essential, advertising and promotion can alert other

potential viewers to a new program and persuade them to try it. Unfortunately, public television budgets permit little advertising, sometimes none. Sadly, only a few underwriters include some promotional allotment in their program budgets.

Still another PBS practice is to carefully schedule on-air promotion announcements for a particular program in time slots where potential viewers of that program (based on demographic profiles) are likely to be found in maximum quantity. Such on-air promotion is crucial because it reaches known viewers of public television, but its effectiveness is somewhat hampered by public television's limited prime-time reach. In one week, a massive on-air campaign promoting one program could hope to reach at best only 20 to 25 percent of all television households, and far fewer would actually watch.

Audience Ratings

Public television must constantly demonstrate its *utility*. Many have contributed to its continuance—Congress, underwriters, viewers. If few watch, why should contributors keep public television alive? Programmers have come to realize that critical praise alone is insufficient; they need tangible evidence that audiences feel the same way. That most convincing evidence comes from acceptable ratings.

Nielsen Data

PBS evaluates the performance of its programs with both national and local viewing data, each having its own particular usefulness in analysis. National audience data are provided by the Nielsen People-Meter service (NPM), and the Nielsen Station Index (NSI) provides the individual market data. In the past, PBS's limited research budget permitted the purchase of only *one* national audience survey week *per month*. Forty weeks therefore went unmeasured. (The commercial networks, as described in previous chapters, purchase continuous, year-round national data.) Even though restricted, NSI's Metered Market Service provided PBS with a comparatively inexpensive proxy for daily national ratings because 66 percent of the country's TV households were within measured markets.

Beginning in 2010, however, PBS finally began a fulltime ratings subscription with Nielsen. The subscription has provided ongoing and detailed viewer information about such programs as *Frontline*, *Antiques Roadshow*, *Masterpiece*, *NOVA* and even *Sesame Street*. PBS apparently moved to more frequent and in-depth information about its viewers to supply more and better data to corporate underwriters (as well as help PBS programming).

Commercial network programmers, to the irritation of advertising time-buyers, have traditionally inflated affiliates' ratings by *stunting* with unusually popular specials and miniseries during the sweeps weeks. These higher ratings provide the local affiliates with an opportunity to raise advertising rates. PBS programmers schedule some new programs during sweeps but rarely stunt for an entire four-week period. PBS does, however, try to schedule a *representative mix* of PBS offerings during each of the national survey weeks. No more than one opera is permitted, for example, nor are too many esoteric public-affairs programs scheduled during that week.

Not being entirely "holier than thou," PBS does practice some stunting during its pledge drives. Just as networks stunt for economic reasons, so too does public television. The difference is structural: Rather than raise revenue by selling advertising time on the basis of ratings, PBS stations raise revenue by direct, on-air solicitation of viewer contributions. Programs specially produced for the drives are scheduled alongside regular PBS series. To an extent, larger audiences mean larger contributions, but a low-rated program may find a small but appreciative audience and prove a lucrative fundraiser. At the same time, high ratings (relative to the whole schedule) have considerable appeal to uncommitted funding agencies and potential underwriters.

Audience Accumulation Strategy

PBS strives for maximum variety in its program schedule to serve as many people as possible at one time or another each week. Unlike commercial network programs, not all public television programs

are expected to have large audiences. *Small audiences are usually acceptable so long as the weekly accumulation of viewers is large, an indication that the "public" is using its public television service.* And so, an important element in assessing PBS's programming success is its weekly cumulative audience, or *cume*. This statistic, along with *time-spent-viewing*, comprises the two basic elements of audience data.

The most important data come from the cumes. Nielsen defines a cumulative household audience as the percentage of all U.S. TV households (unduplicated) that have tuned in for at least six minutes to a specific program or time period. (Six minutes is a minimum figure, the "ticket" for admission into the cume. Even if the viewer watches for 50 minutes, or leaves and rejoins the audience five or six times during a telecast, that person is still counted only once in the cume, provided the six-minute minimum has been met.)

A more typical statistic for public television than cumes are *average audience ratings*. For the major ongoing series in 2010, the composite average ratings were as follows: nature and science programs, 2.3 rating; dramas, 1.8; musical performances, 1.1; news and public affairs, 1.2. Based on prior experience, PBS programmers apply informal guidelines for what rating levels constitute adequate viewing. Because ratings are not the sole criterion by which PBS program performance is evaluated, however, failure to meet predicted levels never triggers a cancellation. Repeated failure to earn the minimum expected cumes, though, could eventually result in nonrenewal.

Loyalty Assessment

PBS researchers also study *audience loyalty* (tenacity) as a way to evaluate a program, something commercial entities pay little attention to. Using ratings from Nielsen's metered markets, it is possible to plot an audience's course across a single program or across an entire multiweek series. If the audience tires quickly of a program, the overnight ratings will slip downward during the telecast (a fate to which lengthy programs are especially susceptible). If the audience has weakened in response to the appeal of competing network programs—such as when a special starts a half hour after a PBS show—the overnight ratings will suddenly drop at the point where the competing special began.

This information tells the programmers (roughly, to be sure) the extent to which their program has engaged viewers. Noncompelling programs are vulnerable to competition. Shows failing this test have to be scheduled more carefully when repeated, preferably opposite softer network competition (like in the middle of the night).

The National People-Meter Service, in addition to TV ratings and cumes, provides a different but equally valuable analytical statistic: the number of minutes spent by people (or households) viewing a single program or even a whole multi-episode series. This time-spent-viewing figure reveals how *much* of a production was actually watched, in contrast to the cume, which simply tells how *many* watched. As mentioned previously, some miniseries earn higher time-spent-viewing figures when stripped on consecutive nights than when scheduled weekly.

Demographic Composition

Another useful way to evaluate a program is by observing exactly who is watching. If a program is designed for the elderly, did the elderly in fact tune in? When African-Americans were the goal, did sufficient numbers switch on the program? Although households tuning to public television each week are, as a group, not unlike television viewers generally, audiences for individual programs can vary widely in demographic composition. Programs such as *NOVA* and *Masterpiece* attract older, college-educated, professional/managerial viewers because these programs can be intellectually demanding. Demanding shows are numerous on PBS, thus its cumulative prime-time audience composition reflects this tendency. Many programs, though, have broader-based followings, among them *Nature* and *This Old House*.

PBS's evening programs have also been found to have an age skew (tendency) favoring adults 35 years of age or older. Few young adults, teenagers or children watch in prime time. The reason

for this skew probably lies in the nature of the evening schedule, which, despite the occasional light entertainment special, consists largely of nonfiction documentaries. According to CBS's top research executive:

> *Our analysis shows that over age 35, you get an adult programming taste. Under age 35, you still have a youth orientation. It is only when people reach their mid-30s that their viewing tastes become more like older adults'…. And their appetite grows for news and information programming.*[8]

Still, public television's overall (24-hour-a-day) cumulative audience demographically mirrors the general population on such characteristics as education, income, occupation and racial composition. That is partly because it is a large audience, with more than half of all U.S. TV households tuning to public television each week and about four-fifths tuning in monthly. Another reason for PBS's broad profile is that the overall audience includes the viewers of daytime children's and how-to (hobbies and crafts) programs, many of whom are not frequent users of the prime-time schedule.

Public television representatives frequently are called upon to explain a seeming paradox: How can public television's audience duplicate the demographic makeup of the country when so many of its programs attract the *upscale* viewer? The question is second in importance only to that of how many people are watching; it is often tied to charges of elitism in program acquisition, implying that PBS is not serving all the public with "public" television.

PBS replies that it consciously attempts to provide *alternatives* to the commercial network offerings; to do so, the content of most PBS programs must make demands of viewers. Demanding programs, however, tend to have less appeal to viewers of lower socioeconomic status (as well as to younger viewers). The result is *underrepresentation* of such viewers in certain audiences. This underrepresentation is, however, on balance, only slight and limited largely to prime time, being offset in the week's cumulative audience totals for other programs having broader appeal.

Critics often overlook the fact that underrepresentation does not mean no representation. *NOVA*, for example, is watched each week in some 900,000 households headed by a person who never finished high school. Even operas average nearly 300,000 such downscale households in their audiences.

Audience statistics serve a unique function: *justification of public television.* Commercial broadcasters and cable operators justify their existence when they turn a profit for their owners and investors; public broadcasters prove their worth when survey data indicate the public *valued* (that is, viewed) the service provided.

Developments Ahead

Some people in the noncommercial field believe the public television station of today will become the public telecommunications center of tomorrow—a place where telecommunications professionals handle the production, acquisition, reception, duplication and delivery of all types of noncommercial educational, cultural and informational materials in all kinds of media and stand ready to advise and counsel people in the community. In this scenario, existing public television stations will transmit, stream or podcast programs of broad interest and value to relatively large audiences scattered throughout their coverage areas; and they will also feed these and other programs to local cable channels and transfer programs of more specialized interest via the internet for use in schools, colleges, libraries, hospitals, industry settings or in use on homes.

Clearly this is a view that has vision and purpose. It describes a project that could excite Americans and provide genuine informational service for a range of populations. Currently, however, little political or industry will exists to take on such an ambitious project. Rather, public broadcasters will continue to struggle to "keep up" with the industry's digital advancements and to maintain the status quo in corporate, member, foundation and governmental support.

In coming years, emphasis will likely be placed on maintaining most of public television as it is,

rather than expanding stations into centers of large public telecommunications complexes. To this end, we will likely see limited growth—probably even more shrinking in overlapping markets—of the quantity of noncommercial television stations, even in areas of minority broadcasting (think Alaska, Indian concentrations, islands, as well as underserved rural areas). Analysts also predict that more stations will either close or separate from PBS in the coming decade. Public television, they suggest, is "overbuilt," characterized by a redundancy that seemed helpful in past years when individual stations provided just a single stream of programming and the internet wasn't a part of television viewing. With the loss of funding provided by the Public Telecommunications Facilities Program (see 10.9), fewer avenues will exist for funding upgrades, making digital catch-up the main focus of effort. And finally, industry insiders look to increased commercialization of the entire system, as stations seek out new ways to fund existing services.

The coming years, then, will pose multiple challenges (a polite word for threats) to those who hold public television licenses across the country. Even as these dilemmas surface, however, public broadcasters are expected to embrace HD, online, on demand and eventually 3D, seeking ways to extend their stations' public services for PBS audiences. As the digital age advances, at least the major public broadcasters will be able to offer even more streams of programming through multiple digital platforms, squeezing smaller stations that cannot follow suit. Nonetheless, an increased amount of content will be provided on-demand; and stations will be encouraged to follow the lead of WNET-New York and Spanish-language channel V-me in offering specialized services for specific populations.

In order for public broadcasting to achieve its public service potential and move beyond the limitations imposed by broadcast towers, the social value of noncommercial, educational video service must be continually reaffirmed by policymakers, public broadcasters and the American public. Public television cannot advance into the new media environment of the mid-twenty-first century without such affirmation. *The public service, and particularly the educational value of this institution, is founded on the principle that a certain portion of the public's airwaves should be reserved for noncommercial, educational use.*

Public financing was a key element of that founding assumption, and billions of dollars have been invested in making public television available to the entire nation. To continue as the national resource that it has become in broadcasting, *public television must further extend its mandate to additional media technologies*. The educational, informational and cultural functions of public television are certain to play a key role in achieving that objective (see 10.16).

A renewed focus on its educational mission will guide PBS's program selection and fundraising efforts in the future. One of its successes, *Arthur*, targets school-age children on weekday and Sunday mornings and is the most watched children's program in all of television, among young children. PBS usually has six of the top-10 preschool programs on U.S. television, including *Barney and Friends, Dragon Tales, Teletubbies* and others.

On the other side, public television is seeking wide-appeal programs, much like commercial networks, that can attract underwriting. One such effort was *Slavery and the Making of America*, a four-part documentary produced by WNET in New York, which was underwritten almost entirely by the New York Life Insurance Company. These programs may signal directions for the future. As with all broadcasters, however, the operative strategy for public networks and stations is *alternative means of program distribution* via the internet, mobile media, and interactive CD- and DVD-ROM.

By 2020, PTV will still be around but may be a smaller collective force on the national and local scenes because it faces daunting competition for product and funds. On the hopeful side, additional digital and online channels along with exciting program ideas, coupled with digital compression and HD pictures, may revitalize the noncommercial television industry. You never know. In the late seventies, PBS President Hartford Gunn advocated three network services for public television, each targeting different audiences and purposes. Video technology—with digital compression capabilities

10.16 KUED's Digital Asset Management—A Case Study

As early as the mid-1990s, former PBS president Bruce Christensen was advancing a compelling argument that the future survival of public television would be determined by the system's ability to return to its roots—*educational* television. Envisioned by its founders as an educational institution that deserved a place beside the public library, public schools and the system of higher education, the local educational television station was seen as a learning resource for the communities they served.

By the late-1990s, the multichannel media landscape contained an enormous array of new delivery systems, and new niche television channels within the commercial sector were successfully attracting television viewers away from what had become known as public television. The arrival of the internet made the situation even more complicated as television programmers scrambled to understand the changing viewing patterns and preferences of the television audience. However, the transition of television from analog to digital production and transmission afforded public television stations with an unprecedented opportunity to reconceptualize the entire television program production process, and some stations did so effectively.

At public television station KUED in Salt Lake City, the transition to digital and HD meant a complete technical rebuilding of the station from the ground up. But this enormous challenge also created the opportunity for station personnel to rethink how programming was produced and the multiple audiences that the station could serve beyond its regular digital television channels. According to KUED's Director of Production, Ken Verdoia, the conversion to digital HD totally revolutionized the way the entire staff defined their mission–seeing KUED as much more than a television station, but rather as a genuine educational institution in service to a worldwide audience.

As one of the nation's leading producers of long-form documentary programs, KUED prides itself in its reputation as "Utah's best storyteller." Today, from the moment a program is conceived, KUED producers begin imagining the documentary program not only as it will be broadcast as a finished television program, but also the multiple educational objectives the program content might fulfill and the media that might best serve them. Since mid-2009, the KUED production staff has been systematically categorizing and archiving program content for delivery online. The station's commitment to Digital Asset Management has completely revised the way production teams perform both in the field and back in the studios and editing suites, as the cataloging of raw footage from every production is now standard practice.

As part of the CPB's American Archive Inventory Project, KUED is not only cataloging and archiving every new program segment it produces, but has undertaken the challenge of cataloging and archiving all finished programs and raw footage that still exists from the station's 53-year production history. The goal is to deliver the station's entire digital library to the viewing public online, around the clock.

While the completion of this ambitious project is still several years away, when finished it will provide an extremely invaluable demonstration of the educational potential of the local public television station in the lifelong learning of humans around the globe.

Robert K. Avery, Ph.D.
University of Utah

and new distribution opportunities—may finally have caught up with his vision.

Notes

1. June-Friesen, Katy, "Surge of Channels, People Meter Chaos Depress PBS Ratings," *Current*, 8 Dec 2008, retrieved at *http://www.current.org/audience/aud0822pbs.shtml.*

2. The broadcast reform movement was an effort by a loosely-organized coalition of not-for-profit broadcasters to maintain a large portion of the radio spectrum for public, not commercial, use. The movement—begun in the late 1920s—generally disbanded after the Wagner-Hatfield Amendment (which would have set aside a fourth of the spectrum for non-profit use) failed in 1934.

3. *ITV* in this now old-fashioned usage should not be confused with *ITV* meaning "interactive television" or "internet television."

4. Credit for this analogy and other portions of the chapter goes to S. Anders Yocum, Jr., who was at that time director of program production for WTTW in Chicago and an early contributor to this chapter, as published in *Broadcast Programming* (Belmont, CA: Wadsworth, 1980).

5. Joachim, Franz, "Personal Interview," 20 June 2011, Albuquerque, NM.

6. Aufderheide, Patricia, *The Daily Plant: A Critic on the Capitalist Culture Beat*. Minneapolis: University of Minnesota Press, 2000.

7. This particular expression was coined by President Charles Van Hise of the University of Wisconsin in the early 1900s, but all land-grant colleges espouse similar traditions.

8. Quoted in Townsend, Bickley, "Going for the Middle: An Interview with David F. Poltrack," *American Demographics*, March 1990, p. 50.

PART
5

Audio Programming Practices

Part Five Outline

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CHAPTER

11

Music Radio Programming

Gregory D. Newton and Matthew T. Kaiser

Chapter Outline

Is radio dead? Googling that phrase turns up well over 100,000 results—ranging from newspaper and magazine articles to blogs to song lyrics. In fact, radio has proven to be a very hardy survivor. Its history is one of continual adaptation and innovation, driven by changes in technology, audience tastes and lifestyles and the industry's economic structures. Successful programmers have reinvented "radio" every generation (or even more often), and stations continue to be a vibrant part of the media landscape for many listeners.

The Shifting Ground

Indeed, radio listening is still substantial—attracting more than 90 percent of the U.S. population in every age demographic each week.[1] Radio revenues actually increased in recent years, and industry experts project continued increases in the years ahead (through 2015). Although listeners may spend a bit less time each day with their favorite stations, in part due to the sheer number of alternative audio and other media choices, radio remains a central portion of the daily media diet for most people.

Nevertheless, changes that rattle radio's foundations erupt more frequently. It's hard to overstate the impact of media consolidation that came out of the 1996 Telecommunications Act. For station groups, who the competition is has altered. It used to be that a *program director (PD)* was responsible for one or maybe two stations, and the competitors were the other stations in the same local (geographic) market that were broadcasting in a similar (or identical) format, or that were targeting the same demographics. The competition was owned by somebody else, and disc jockeys worked for a single station (or maybe were heard on-air on co-owned AM and FM stations). But a single owner can now control five, six or even eight stations in a single market. Most of the listening in a market is typically controlled by two or three owners. The most direct "competitor" may be across the hall rather than across town, and the on-air talent is likely working for several stations during each day, in the local market and perhaps also far across the country.

PDs working with station *clusters* need to understand their company's vision of the radio market and the roles of their particular stations in their company's overall strategy. In other words, programmers are brand managers—responsible for all of the elements that *position* each co-owned station and with the strategic goal of dominating listening within a demographic category or a set of formats. Most major group owners specialize in one or more formats. These specialties may be in one or two related formats that nearly always appear in any market they participate in—even though they may have a dozen or more formats across all of their stations. Alternatively, the owners may have a true format specialization strategy in which all their properties are programmed in a very narrow format range. For example, Clear Channel dominates the contemporary hit radio market whereas Cumulus is a country music leader, although both owners have stations programming many other formats. Taking a more audience-focused approach are companies like Univision Radio, the largest operator of Hispanic-oriented stations, and Radio One, the country's largest owner of stations targeting African-American and urban audiences.

Two factors, the superfast growth of digital media platforms—particularly internet streaming and mobile phone applications—and the convergence of various media forms, make it essential to now take a broad view of the elements that make up successful radio programming. First, the audience now has a plethora of new listening choices that did not exist just a few years ago or were not generally available in the car, radio's most important listening location. Second, mobile apps have dramatically expanded the range of listening options for anybody with a smartphone (and an adequate data plan), although broadcast radio retains some inherent advantages.

Despite the fragmented, complex and rapidly changing landscape of contemporary radio programming, the more things change, the more we see that (at least some) things stay the same. Key elements of the tried-and-true programming formulas that worked in the past remain successful (not only for broadcast stations but for many of their

competitors and imitators). Thus, programmers need to understand the history of the industry—what worked, what didn't, and how radio has survived by continually reinventing itself—as well as the new elements in the competitive environment that also shape their opportunities to build and serve an audience.

A Little History

In the beginning, there was broadcasting, and broadcasting consisted of AM radio stations. There were fewer stations (and far fewer competing media) than now, and it was possible to appeal to an extremely broad audience through a strategy of providing a little of something for everybody. Stations typically programmed not only some live music but also comedies and dramas, news and talk programs, farm information, game shows, soap operas and a great variety of other programs for people of all ages. Some of the programming was produced locally, but much of it came from local and regional network sources that sprang up to serve the growing new medium. The industry quickly recognized the economic advantages of producing one program for many stations versus many programs for many stations; and the first stars of the new medium were created as successful programs were carried on more and more stations.

Then came television. Television took many of radio's entertainment programs, and much of radio's audience followed their favorite stars to television. "Radio is dead," said some. "It is old-fashioned. Who wants just sound when you can also have pictures?" But radio was not dead. Instead, a new style of programming emerged. The local radio station no longer tried to supply all types of programming to all people some of the time but instead offered the most important programming to some of the people all of the time. The *format* approach created a new golden age for radio.

The first music format was top 40 radio. It is difficult to say with certainty who really invented top 40, but Todd Storz and Gordon McClendon are the two programmers who are generally believed to have respectively created and perfected the approach. Rick Sklar and Bill Drake are other leaders among the early programmers who significantly advanced the elements of the format. The original top 40 format was not music genre specific. From pop to country, a top 40 station played a little bit of everything, as long as it was a hit, and adjusted the music rotation by times of day (*dayparting*) to cater to the available audience. Music fans now had a place to hear the most popular songs of the day, any time they wanted to tune in. There was, of course, also some regional variation—the most popular songs in Nashville were likely to be somewhat different from the most popular songs in Chicago or New York City.

Over time, the number of stations and the competition for listeners increased. FM stations developed in a different part of the spectrum and offered better audio quality. And some programmers asked whether it was a bit strange to have a country song alongside a rock song followed by a jazzy ballad. Radio stations soon found it necessary to fine-tune their formats to target a specific audience (*segmentation*)—fans of particular types of music. Thus, top 40 radio stations focused increasingly on the most popular pop (and rock) songs but still kept room in their playlists for the occasional crossover country or rhythm & blues song, while other stations adopted different niche formats. At first, there were four: country, album-oriented rock (AOR), urban or R&B, and middle-of-the-road (MOR). Now, fans of particular broad types of music could find what they wanted on the radio any time they wanted to listen. Those with wide-ranging tastes still had top 40 stations.

Radio continued to thrive, and because it looked like a good business, still more stations came on the air through the 1980s as the number of FM listeners surpassed AM. As more and more stations competed for listeners, they needed to find new ways to attract audiences. Thus, the four niche formats produced offspring, alone or sometimes in tandem, while the "mainstream" parents also continued to thrive. From country came traditional country and "young country." AOR spun off classic rock, active rock and alternative. MOR led to adult

contemporary (AC), oldies, soft (or Lite) rock, beautiful music/easy listening and adult standards (the old middle-of-the-road, or MOR). Then programmers began merging elements of existing formats into new hybrids. Urban and top 40 (now known as contemporary hit radio, CHR) combined created a format originally referred to as "CHurban" but that is now known simply as rhythmic CHR. Urban plus AC can be divided into urban AC, smooth jazz/new age, and urban oldies formats. AC and CHR? That's hot AC and adult CHR.

Stations and formats continued to multiply through the 1990s, fragmenting the audience even further. Programmers responded by further subdividing and combining musical genres and other programming elements into new niche formats in the larger (and some of the smaller) markets. Rock, alternative and AC playlists were merged into an adult album alternative (AAA) format. In turn, pop songs from alternative artists and hot AC were combined into modern AC. Alternative plus some programming elements that are more CHR than AC leads to modern rock. Once alternative existed for a decade or so, it was obviously time for alternative with a classic rock approach, thus classic alternative (or modern gold). Pop mixed with a little classic rock and an AC presentation style creates classic hits ("the best music of the '80s, '90s and today"). Oldies multiplied into specific '50s, '60s, '70s and '80s formats (or '50s/'60s and '70s/'80s in some markets). Contemporary Christian, and then Christian AC and Inspo emerged from traditional gospel, AC and CHR elements.

American radio's family tree also became more global as various Hispanic formats appeared, similar in their structure to existing CHR, AC and country. Latin music formats (including regional Mexican and Caribbean music as well as contemporary and gold-based Spanish-language) appeared in niche variants, and Spanish-language news/talk formats grew rapidly—leading the market in some areas of the United States. Formats have exploded in the past few years. *Billboard* lists four separate Spanish-language charts, reflecting the diversity of cultures and music often lumped under the umbrella terms *Hispanic* and *Latin*. And as with Anglo formats, there is frequently some crossover between particular formats (see 11.1).

To get some idea of the musical artists that are characteristic of each format (or who cross over format boundaries), consult the charts in trade publications such as *Billboard* (*www.billboard.com*), *Radio Info* (*www.radio-info.com*), *Friday Morning Quarterback* (*www.fmqb.com*) or *All Access Music Group* (*www.allaccess.com*).

11.1 Spanish-Language Radio Formats

Spanish-language radio formats are found in large regions of the United States, especially the West, Southwest and Southeast, as well as in most major cities. Four of the most common formats are the following:

- **Tejano.** The term itself refers to Texans of Mexican descent; the music is native to South Texas. The music and the instruments reflect not only traditional Spanish and Mexican influences but also the presence in South Texas of other European immigrants in the nineteenth century, particularly Germans, Czechs and Poles. Thus, Tejano music draws on Mexican folk, polkas and waltzes, as well as on contemporary Latin and rhythm and blues influences.
- **Regional Mexican.** This format features the traditional music of Mexico from the past 100 years. It embraces several specific styles, including ranchero, banda and Norteña (a musical cousin of Tejano historically rooted in northern Mexico).
- **Tropical.** The music is primarily from (or influenced by) Spanish-speaking cultures in the Caribbean. It also has influences from some northern countries in South America as well as Central America. Music styles include salsa, cumbia and merengue, among others.
- **Latin pop and Latin rhythmic.** These are the Spanish-language versions of the standard CHR formats, drawing on the most popular music in many Latin styles.

The past three decades also brought additional competitors to the music and audio marketplace, including cable radio, satellite radio, HD radio, streaming audio, mobile applications, and such social media as MySpace and Facebook. The major differences between these media and what have been traditionally called radio stations are that broadcast radio and HD radio retain a *local* focus, even if they incorporate national news networks and syndicated music and information; and they are available to the audience at no additional cost beyond a receiver. Cable radio and satellite radio, on the other hand, require a subscription fee and are essentially *national* services available in identical form all over the country. Streaming audio and mobile applications for devices like the iPad and various smartphones are a mix, with connections to local stations' content as well as possible programming from all over the country (and the world).

The thousands of audio services available online run the gamut from simply repeating the programming of local radio stations to offering web-only broadcasts of every imaginable sort, all with a potentially global audience. Along with all of the formats offered by broadcasters, these services provide other music not widely available—traditional jazz, blues, world beat, reggae, show tunes, bluegrass, folk, classical, kids. There is even a satellite channel and other services dedicated to unsigned bands. Some services, like Pandora, use complex algorithms to customize music rotations for listeners (much like various consumer web sites "suggest" other products you might like based on past customer behavior). Streaming audio content is best conceived as "all of the above."

Good programming is carefully designed to appeal to particular listeners, and tastes vary from region to region and among markets in a region. For example, the top-rated station in New York City has an adult contemporary format, with classic hits, two CHR rivals and a tropical station rounding out the top five. In Chicago, meanwhile, news and talk are more dominant—occupying three of the top five slots—while the top music formats are urban AC and hot AC. Just 90 minutes north in Milwaukee, on the other hand, the top five stations are news/talk, country, oldies, CHR and either classic rock or mainstream AOR (depending on just how one chooses to view recent ratings). If you head south to Memphis, gospel appears among the top five or six stations along with urban, urban AC and country. In Dallas, regional Mexican and contemporary Christian are among the top formats along with CHR, country and classic hits. *Such strong differences mean that a smart program director always tailors a station's programming to the available target audience within the market it serves.* The advertising value of different audiences (or, for some services, the audience's ability and willingness to pay a subscription or software fee), the station or service's technical facilities, and the existing competition in the market also affect programming choices.

Terrestrial Radio

Since the turn of the century, *digital audio broadcasting (DAB)* has been supplementing both terrestrial AM and FM analog broadcasting, improving the sound quality of each. Although most other countries have adopted a digital radio system that uses a different portion of the spectrum—and that therefore makes digital broadcasting incompatible with existing radio (such as the Eureka 147 system used in much of Europe) in those countries—the United States has chosen to create an *in-band-on-channel (IBOC)* system that operates within the current AM and FM spectrum allocations and is totally compatible with existing AM and FM systems. Thus, unlike with broadcast television, no date for ending analog AM and FM broadcasting in the United States has been established.

The U.S. IBOC technology is licensed to equipment manufacturers and stations by iBiquity Digital (*www.ibiquity.com*), and stations broadcasting a digital radio signal have to pay annual royalties to iBiquity. Referred to as *HD radio* (note the parallel to high-definition television in the name—something already familiar-sounding to consumers), it is multiplexed along with the primary analog FM or AM signal and requires a special HD receiver. Digital FM allows for inexpensive *simulcasting* (repeating the main signal, ads and all) at startup. This can be

followed by the creation of specialty signals for local news, sports and other content for narrow niches, or the use of content from other co-owned stations, perhaps from other markets (*multicasting*) on secondary (HD2, HD3 and HD4) channels if the broadcaster has the desire to split the bandwidth.

As of mid-2011, fewer than one in five U.S. stations were broadcasting a digital signal (see 11.2). Digital authorizations from the FCC amounted to:

1646 FM stations
297 AM stations
2 FM translators
1 Low Power FM

Cable Radio

Many U.S. cable systems and DirecTV and Dish (the two TV satellite services) offer dozens of digital audio channels alongside digital television. These are large packages of nationally syndicated channels from such companies as DMX (formerly Digital Music Express) and Music Choice. In addition, DirecTV and DISH offer satellite radio programming on some of their programming tiers. Cable audio thus comes in a dizzying array of formats, ranging from bluegrass to rap to salsa to gospel to pop Latino, just as internet audio does.

The disadvantage of cable radio for most people is that reception requires a wireline (or satellite dish) in a house or office. The advantages are that these audio services come automatically along with certain tiers of television service and are available all the time, although some, such as DMX, are pay services. MusicChoice also provides many of the same channels both on cable and online. The online availability of the service thus makes music available to subscribers not only at home but also anywhere they can access a broadband connection.

11.2 The Slow Adoption of HD Radio

Stations broadcasting HD radio were mostly the members of the "HD Radio Alliance" that formed in 2005 to promote the service—CBS Radio, Clear Channel Radio, Greater Media, Emmis, Entercom, Bonneville International, Beasley Broadcasting, Buckley Radio and WBEB- FM Philadelphia. With relatively few stations and thus little compelling programming incentive beyond the already available analog choices, it's not surprising that few consumers have purchased digital receivers, although there are several choices available for consumers.

One other major factor slowing the adoption has been the slow pace with which the automotive industry has added receivers with HD radio as either standard or optional equipment in their new car lines. As of 2011, HD radio was available from 17 auto manufacturers, representing 109 car models. That may sound like a lot—but represents no more than one-third of the models available (GM and Honda are most notable among those completely absent). More important, HD capability was included in the standard receiver in just 54 of those new car models.[2]

One additional concern that delays a shift to HD Radio by both AM and FM broadcasters has been the inability to maintain their existing *coverage areas* (the geographic areas where listeners can receive an adequate signal). With analog broadcasting, a station's signal gradually fades in quality farther away from the transmitter, creating a fringe area at the outer reaches where some listening is still possible. However, a digital signal is subject to a *cliff effect*—the signal is either of sufficient quality for the receiver to reproduce or it is not. The FCC tried to address this problem through a rule-making that resulted in a 2010 order that permitted greater power levels and improved coverage for digital transmissions. But so far, this has had little effect. Broadcasters are a stubborn group, it seems.

There are other problems for radio programmers considering a move to digital. The processing required, at both the transmitter and receiver, creates a delay of several seconds compared to analog signals—no small concern for stations who regularly broadcast live promotional events or sports. The delay means talent on location (in the field) monitoring the on-air signal for cues would be several seconds behind what was happening back in the studio. Slotting in commercials without accidentally covering up reporting sometimes becomes next to impossible.

Satellite Radio

DARS (digital audio radio service) refers to high-powered national satellite signals that require only a small receiving antenna that is especially suited to cars and mobile media. At the start of the 2000s, Sirius and XM were two competing satellite-radio providers licensed by the FCC. Each provided more than 100 channels of audio service nationwide to a combined total of nearly 14 million paying subscribers (for $12.95 a month). Like most large radio companies today, both were publicly traded corporations and eventually were forced by economics to merge in 2008, becoming *SiriusXM*.

Although their individual subscriber bases had grown rapidly by 2007, a great deal of subscriber churn had also occurred. The two services had tried to distinguish their programming by introducing original live talk and sports, and to make things worse, both had marketed themselves as different not only from terrestrial radio but from each other. Moreover, each had signed deals with substantial rosters of cable networks that supplied news, sports, music and other content, and each had various exclusive agreements with consumer electronics manufacturers and retailers and with specific car manufacturers. In addition, XM provided Major League Baseball games, and Sirius had the infamous Howard Stern (see Chapter 12).

But by 2007 it had become clear that the national market could support only one service. Because their receiving equipment was not compatible, the two combined companies had to juggle various programming options for current subscribers by repurposing channels on each system and creating a dizzying array of tiers of service. Depending on their receivers and interests, subscribers can choose from packages delivering between 120 and 180 channels for a monthly charge ranging from $12.95 to $16.99. Over half of the channels are dedicated to various music formats, most of which are commercial-free; the rest offer news, information, sports, foreign language content and other special programming from former terrestrial radio stars like Bob Edwards, Howard Stern and Opie & Anthony as well as multimedia stars like Oprah and Martha Stewart. Access to the content from the featured stars is the primary cost difference among most of the tiers. SiriusXM programming is also available online, either as a value added bonus of a satellite subscription or as a stand-alone offering.

Online Audio

Widespread adoption of broadband internet service has opened several opportunities for online distribution of audio content. These can generally be grouped into two categories. The first, *streaming* or *webcasting*, is akin to traditional radio programming because content is delivered in real-time over the network to a computer. Some of the streams available are the programming of terrestrial radio stations, but there are also many, many online-only services ranging from professionally formatted channels from big companies like AOL to offerings that could be fairly described as hobbies. Those providers have the advantage of not needing a license from the FCC and are happily without content oversight by the government other than that imposed by defamation or obscenity statutes. However, as with all digital audio services (including satellite radio), online services pay music performance royalty fees to the record labels and recording artists beyond those that apply to analog terrestrial radio, making the economic structure of this market more difficult.

The issue of copyright has limited some of the potential of online music. However, a more open online space is taking form. In particular, the British service Spotify launched its U.S. service in 2011 with a library of over 15 million songs. The service presents listeners with the closest thing yet to "any song, anytime, anywhere" (or any song anywhere for the 10 percent or so of Spotify users willing to sign up for the service's paid version that grants full library access from any device). While it's clear that personal, portable music devices from the Walkman to the iPod have cut into the amount of time listeners spend with radio (and have limited the ability of radio stations to stake out musical turf to call their own), the bandwidth costs of mobile data plans and the requirement to purchase a premium subscription to use Spotify on a mobile device may yet limit how

much additional damage a service like Spotify—where the music resides in the cloud—can do to radio.

While that online audio market is growing, only about one-third of the U.S. population 12+ reports listening to streaming audio in the past month as of 2011.[3] Most online listening occurs on desktop or laptop computers in offices or homes although interest in, and access to, audio on mobile devices (smartphones, tablets) is increasing. Compared to broadcast or satellite coverage, wireless broadband internet connections are less widely available. However, wireless providers continue to expand the networks. When wireless broadband is ubiquitous for subscribers, the "radio" marketplace potentially expands from a few dozen or scores of choices within a local market to tens or hundreds of thousands.

Nonetheless, limits on mobile subscribers' data plans may check their willingness to devote large blocks of listening time to online radio on smart phones. That will, in turn, curb the short-term growth of online listening as people increasingly move their overall online use to mobile platforms and have to make choices about how to allocate data usage. Although audio doesn't consume as much data as video, a heavy listener could easily run over the allotments of many carriers' lower tiers of service, and that'll hurt when the bill comes in.

The second type of online audio service, colloquially known as *podcasting* (the result of the Apple iPod's early dominance of the audio player market), is archival in nature. Prerecorded content is downloaded from a provider's website to a computer and can then be transferred to another listening device. Podcasts are therefore more mobile at this time than streaming services. However, because of licensing problems, podcasts seldom include popular music and are primarily filled with the spoken word… lots of them.

Broadcast Radio and the Internet

It is absolutely imperative that a radio station have a strong presence online. While this may seem like common sense in today's environment, some broadcasters still shun online, seeing it as a distant second to their terrestrial signal. Such operators have a deeply entrenched "old school" mentality that makes digital integration a struggle if not downright impossible. They argue that it's the over-the-air station that pays the bills and efforts to put in place 'secondary media' would cannibalize their listening audience. Incredibly shortsighted, these broadcasters will quickly find that they face the very real problem of becoming irrelevant to listeners and, in the not so distant future, obsolete. *The changing digital landscape is making such traditional concerns as market size and geographic location into afterthoughts.* After all, with an internet connection, you can be a part of the CHR community on Z100 in New York or KISS-FM (KIIS are the actual call letters) in Los Angeles just as easily as you can KTRS-FM in Casper, WY, or Q-102 in Albany, GA, even if you live in Indiana or Texas.

As its history shows, radio stations have repeatedly been forced to adapt to technological changes and increased competition for the audience and advertisers. The internet is quite literally the latest in a long line of challenges facing programmers searching for a big enough piece of the audience pie. In the 1990s, radio still enjoyed several advantages, particularly portability, over early attempts to distribute programming online. The development of wireless internet services (Wi-Fi) and small portable audio players (like the iPod Nano which also contains an FM tuner) are removing the portability advantage of traditional broadcasting. *To maximize their audience and the value of their programming, smart programmers leverage their existing audience goodwill and brand recognition in order to aggressively court the online and mobile audiences while not forgetting the traditional (and larger) broadcast audience.* Indeed, this symbiotic relationship between on-air and online is one of the most difficult for programmers to figure out. *The problem facing all of them, from the smallest local markets to largest national groups, is how to best compete effectively.* And that often means competing for every available listener, including the relative fewer online, in the increasingly fragmented market.

Oddly, for an industry whose past norm was change and adaptation, radio has been extremely

slow to accept the online world as a viable extension of a station's brand. The current problem may stem from the fact that there continues to be no clear right or wrong answers as to how to approach digital integration. Consolidation in the 1990s further clouded the situation. Many utility players and younger staff members who would previously have been given the reins of digital media were instead eliminated to maximize profits. Certainly another consideration is the financial risk; many managers were hesitant to be innovative with no guarantee of a return to the bottom line (see 11.3).

Finally, by 2000, radio stations and associated companies like Arbitron and Nielsen seemed to sense the changing environment and began a furious game of catch-up. The farsighted feared that the window of opportunity for attracting and profiting from the new media audience might close before they could develop a serious presence in that environment.

At first, the stations that did have an online presence did little more than put up rudimentary websites that, at their most technically advanced, offered listeners the ability to email requests to the station or possibly provide screen names so they could instant message the jocks in the control room. The majority of these sites were often the product of one poorly equipped and already overloaded staff member at the station or done as *trade* (a service or goods provided in return for advertising time on the station) by the station's internet service provider (ISP). The results generally gave listeners little reason to visit once, let alone return for subsequent visits. Moreover, stations and listeners alike were often frustrated by the technological problems that made it difficult to deliver high-quality content, usually stemming from insufficient bandwidth. The bad news was that stations actually offering programming online found that it an expensive way to reach only a few listeners.

However, as bandwidth became a more affordable commodity to the average broadcaster, and as online content became an increasingly important portion of the average consumer's media consumption, it became clear (to most insiders) that radio would have to adapt once again if it expected to remain a viable option in a sea of ever-increasing choices. The stations that were most successful in the mid-2000s realized that by offering compelling original content, they were able to *attract* audiences that actually helped *increase* traditional station listenership and as a bonus, online provided an additional outlet for revenue to advertisers. During this time, the added revenue streams from digital properties and station events became known as *Non-Traditional Revenue* or *NTR*.

It is important to remember, however, that for each additional stream a station puts online, there are additional royalty costs associated with their broadcast. Currently, there is a "per performance" royalty rate scale in place with varying rates for broadcasters, statutory webcasters and pureplay webcasters that is approved for modest yearly increases through 2015. Each time a song "airs" in a digital stream in 2012, broadcasters are expected to pay $.0020 per performance per listener, with that rate increasing to $.0025 by 2015. While a fraction of a cent per play per listener might not seem like a tremendous amount, those costs easily (and quickly) add up, leaving some broadcasters feeling that online streaming is not a financially viable business decision.

Some larger companies not only support online streaming, but actively promote mobile phone applications (apps) that provide easy access to a station's content. Some individual stations have launched their own branded apps, but apps that aggregate many stations and other audio content nationally or even globally dominate the market. Clear Channel Communications, one of the most aggressive companies in the mobile environment, released its *I Heart Radio* app, which provides access to a stable of more than 750 stations from coast to coast. Listeners have the ability to select by market or format and to stream the station's online content. *CBS Interactive's radio.com*, *TuneIn Radio* and *Public Radio Live Stream* are other widely used apps, each offering access to hundreds or even thousands of audio streams.

Many barriers to expanding a station's reach in a crowded terrestrial environment disappear in the digital world, but going digital is not without new dangers for broadcasters. A question raised briefly earlier in this section is the idea of geography, more specifically

11.3 Online Strategy

As radio's attitude towards digital media changed and the right technology became more accessible, broadcasters were forced to develop strategies for programming in a new environment. The simplest was to merely rebroadcast the over-the-air signal in an online stream—commercials and all. The *streaming audience remains largely popular among at-work listeners*. As more people accessed to audio through their computers, cell phones and music players, streaming audio became a viable competitor to broadcast radio. Happily, when a station streams itself, the online version can be jointly marketed as a sister-service to advertisers. For more information on the streaming audio market, consult *Radio and Internet Newsletter* (updated five days a week at *www.kurthanson.com*).

Simply rebroadcasting a station, though, can cause big trouble because not all commercials are licensed for streaming online. This seems counter-intuitive; you might think that any opportunity to put a commercial in front of more ears would be a clear advantage to the advertiser. And while that may be the case, many national spots use union talent to voice and produce their commercials, and under union regulations, the spots are only licensed for use at the specific over-the-air times and dates that were purchased by an advertising agency or via a station barter agreement. While obviously not the best-case scenario both legally and ethically, some stations elect to broadcast these commercials on their internet stream anyway until presented with a cease-and-desist order.

Savvy broadcasters contract with an *ad insertion service*, which allows selective online preemption of commercials. Companies like Ando Media provide software that allows stations to target certain streamed commercials and replace them with other inventory. Public Service Announcements (PSAs), other local spots (say, for a local car dealer sold in addition to their on-air advertising schedule), and streaming exclusive content can be used as filler. Web exclusive songs, for example, that are not available in any other format—including the over-the-air broadcast—provide an exclusive audio element to promote and to reward listeners.

A more complex strategy for programming radio online goes far beyond rebroadcasting the terrestrial signal to offer a wide-array of additional content. This includes on-demand content, video and additional audio streams. Such aggressive strategies seem to win with consumers and give listeners a definitive source for "discovery" of music, which has always been a strong suit of terrestrial radio. Content-rich websites should include numerous features of use or of interest to audience members. Some stations integrate online playlists within their websites and give answers to most-common-listener-questions like "What song are you playing right now?" or its more frustrating variation, "What was the song you played last Thursday right after the weather forecast?" In addition, websites can showcase local community information, coupons from local merchants and online-only promotions. Advertisers who choose to participate in online-only campaigns find they are typically more affordable than their over-the air counterparts. They also give the advertisers the ability to provide more information about their products than can fit into traditional :30 or :60 commercials. Some stations will go so far as to create an online "virtual mall" in which many local retailers feature their products (for a fee, of course) or where they hold "half-off" promotions that give the station's listeners the chance to purchase gift cards or restaurant certificates for half price. These ideas provide more affordable opportunities for advertisers, as well as another NTR revenue stream for stations.

Online sister-stations can take several forms, including subniche formats designed to superserve one or more fragments of the broadcast station's audience. For example, a "new country" station can offer an online stream of "classic country" to serve the audience portion that prefers the classics, but which may not be large enough to sustain the ratings needed for a terrestrial station.

"who really is the audience of our station?" This used to be much clearer before the internet: "*Our audience is anyone who listens to country music as far as our signal travels,*" and that answer sufficed for decades. However, broadcasters streaming online have the potential for national and even global reach. As wireless internet access expands around the world, the number of consumer devices capable of accessing